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# Universities of the Third Age in Poland. Emerging Model for 21st Century

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**Abstract** - Main objective of this paper is to describe emergence of a Polish Universities of the Third Age model. These are a multi-disciplinary non-formal education centers, which allow formation of positive responses to the challenges of an ageing population. Article indicates main organizational changes of these institutions conditioned by internal and external factors. Essay describes transformation, differentiation factors, and characteristics of these institutions for elderly based on a critical analysis of literature.

**Keywords** - creative ageing policy, Third Age Universities, standardization, fourth age, silver economy

## I. INTRODUCTION

The complexity of population ageing effects includes: increase in population of needing care seniors, demand for new social, health and education services, investments in public transport, organization of space without architectural barriers as well as changes in family, consumption, innovation and productivity of human labor structures. An important part in response to these challenges plays Universities of the Third Age (U3A; pol. Uniwersytety Trzeciego Wieku; UTW). These interdisciplinary centers of informal education have influence on improving the image of seniors as an active and willing to voluntary work in favor of others as well as creating the image of universities as institutions involved in solving the problems of local communities. However, at the beginning of 21st century national U3A requires adaptation to the needs of organizational rules and skills of successive generations. Younger generations shapes not only society and economy based on information's, or on knowledge and networks, but on creativity and wisdom. Purpose of this article is to introduce the concept of further development directions of U3A, which are present in a Polish scientific and political discourse. Based on a critical analysis of the literature will be explained respectively: perceived opportunities and threats of U3A activity, internal and external factors of their adaptation to the requirements of organizational rules of modern societies and economies as well as features of the new U3A models. Summary indicates further directions of research.

## II. OPPORTUNITIES AND THREATS FOR UNIVERSITIES OF THE THIRD AGE AT THE BEGINNING OF THE 21ST CENTURY

Main objectives of the first U3A established in Toulouse in 1973 - which is the basis of the French model - were [1]: enabling lifelong learning for older people; educating students in the field of social gerontology; preparation of specialists working for elderly people; as well as conducting research on medical, legal and psycho-social issues old-age. Success of this U3A concept resulted not only from its affiliation with

institutions of higher education and involvement of senior citizens, but also engagement of young people and students who have served them with help. Therefore, this model is sometimes defined as "university for all ages". The second classic model of U3A - British - is entirely different. It is assumed here, abandonment of using the university support towards the development of self-help, volunteerism, as well as abolition of students and teachers division [2].

In recent years, new national and continental models appeared - including the U.S., Canadian, South American, Russian and Chinese models. Possibility of targeting U3A activities on new goals was also recognized. New goals mainly includes: free time management for seniors and compensating decrease in the number of students at higher education institutions [3]; preventing seniors digital exclusion [4]; as well as influence on cities and regions development, including shaping basis for "silver economy" systems [5], namely those that are oriented to adjust the spheres of production and distribution of goods and services to the needs of an ageing population. Main component of these systems is gerontechnology as a new paradigm for research and implementation [6,7].

Above transformations are accompanied by criticism of U3A concept. Above all, it is noted that:

(1) U3A use the imprecise "third age" term and run political economy which is limiting satisfying different needs of the "fourth age" representatives. "Third age" term suggests that U3A are centers directed not to all elderly, but to those in the early stages of old age, which are defined by the experts of World Health Organization as a "young-old". These are persons between 60 and 74 years of age who are able to maintain physical, mental and economic independence. Meanwhile "fourth age", otherwise "old-old", are persons in 75-89 years age group, requiring support of others, and more likely to have disabilities, Parkinson's disease and Alzheimer's [8].

(2) Another criticism of U3A is elitism - service the to higher classes of society and recovery of social inequality as well as the division into "young and old" which results in limited ability to generate positive effects of social capital [9,10,11].

(3) U3A activities without university affiliation or by placing them in their administrative structures, as well as focusing on offering entertainment and recreation leads to lowering the prestige of universities [12].

At the same time differentiation of U3A is justified if these centers are going to activate by educating as many people as possible. According to the Polish U3A National Agreement in 2011 there were about 320 such facilities with more than 100 thousand members. In 2012 there was already 385 centers and about 90 thousand listeners<sup>1</sup>. At the same time in 2011 country inhabited approximately 7.7 million persons of 60+ age, while in the 2035 is projected to increase their numbers to 10.8 million [14]. Growing popularity of U3A is partly explained by an ageing population and changing lifestyles senior citizens, but it should be noted that their participants are still a small part of the total elderly social category<sup>2</sup>. Essential to the success of U3A was also support system carried out in 2005-2008 through Polish-American Freedom Foundation (pol. Polsko-Amerykańska Fundacja Wolności) as part of grant program.

At the beginning of 21st century Polish U3A face a dilemma not only to respond a varied interests of further, more and more prefigurative generations of seniors, but also in front of demand for: professional gerontology research units, preparing for old age as well as building repositories of elderly knowledge and experience. Meeting these challenges requires a positive solutions to such problems of U3A as: shortages of funds, ability to write projects and fundraising, lack of offices, lack of cadres and finally legal and administrative difficulties [15].

Also at least three phenomena provides reasons to change U3A organizational rules:

(1) First, the significance of new information and communication technologies with media, especially the Internet, which allows the inclusion of seniors, their teleworking, e-volunteering and e-services including in health, education, shopping, banking, mental exercises, participation in culture [16].

(2) Secondly is shaping society and economy based on creativity and wisdom. These are systems in which individuals, groups and entities of public life are facing changes in their necessary cultural competencies [17]. The importance of imagination, creativity, responsibility, and gathering experience is growing. At the same time these capabilities are increasingly used in the creative industries to achieve technological innovations. Under these conditions not only paradigm of active ageing, but also creative ageing is formed. It is a concept that combines art with life-long learning and the use of seniors experience for transferring their

legacy to future generations [18]. That policy could be considered as a supplement to United Nations concept of "society for all ages". Benefits from the seniors creativity can be identified in four groups: participants, the arts sector, the health sector and society as a whole. Seniors creative capital building is reflected in: documents and strategic programs; network organizations; as well as urban cultural and artistic institutions [19,20].

(3) Third, the implementation in developed countries like the United States and Japan, the programs under the slogan "from Internet to Robotics" both reduces labor shortages, increases the pool of older workers leisure time, as well as leads to the phenomenon "robotics divide", that is unequal access of countries, regions, individuals and groups to the possibility of automation and robotics useful in everyday life for seniors as well [21].

### III. INTERNAL AND EXTERNAL CHANGES SOURCES IN UNIVERSITIES OF THE THIRD AGE

The basic adaptation process of Polish U3A to the contemporary challenges is taking steps to organize and improve the quality of education. Since 2007, the National Federation of U3A (pol. Ogólnopolska Federacja Stowarzyszeń UTW) is running. And from 2009 National Agreement of U3A (pol. Ogólnopolskie Porozumienie UTW). They are "umbrella organizations" to represent the common interests, exchange of experience and dissemination of U3A ideas. On the First National Convention of U3A in 2009, it was decided to implement a self-accreditation and to undertaking training in implementation of Quality Management System ISO 9001 for U3A [22]. In 2011 U3A from Warsaw School of Economics, as a first certified ISO and started to promote this procedure as a good practice. While self-accreditation is reporting to Foundation for the Jagiellonian University (pol. Fundacja dla Uniwersytetu Jagiellońskiego), organization animating Polish U3A movement, evidence of meeting by these centers, four criteria: (1) activity for a minimum two years based on the statute or other regulations, (2) formal signed patronage agreement with a university, (3) ownership of the program board with representatives from higher education and finally (4) availability of detailed teaching plan. After checking these documents Jagiellonian University Foundation confirms the status of self-accreditation.

While in 2012 was prepared a set of U3A performance standards. Authors of this system acknowledge promoted by the European Union, "lifelong learning" concept as a major development perspective for U3A in the context of building a knowledge-based society<sup>3</sup>. The standardization process is understood here as "definition of common U3A functioning areas in relation to legal and formal aspects, content-organization and cooperation with other external entities"<sup>4</sup>. Standards were divided: (1) formal-legal standards; (2) substantive and organizational standards; (3) standards of cooperation with external entities. The first area concerns the mandatory requirements arising from the law. While others are optional and further sub-divided into three levels of increasing

<sup>1</sup> See [13] and [11] pp. 5-6.

<sup>2</sup> See [11] pp. 5-6.

<sup>3</sup> See [13] pp. 14-15.

<sup>4</sup> See [13] pp. 18.

progress in implementation of standards. Training conditions of U3A for their implementation, verification and granting of certificates were also defined. They are diverse and adequate to the professionalization. However certification system is still under development. It is noted that standardization process should provide benefits such as: organizational development; professional growth; improve customer service; increasing the efficiency of management; increasing the transparency of operations; improve the quality and attractiveness of offer; increasing the reliability of the entity; increasing attractiveness of entity as a cooperation partner; increasing the chances to raise funds for statutory activities.

It should be noted, however, that the appropriate standards currently depends minimum and recommended conditions for functioning of organization and increasing its performance. In the context of diagnosed development challenges for U3A it is appropriate to prepare the "optimal standards" - rules, norms and procedures that will help to achieve the best possible outcomes for organization, without involving an unjustified increase in the economic, social and environmental costs [23]. It is possible to extend the requirements for areas such as: organization management, conducting financial affairs, implementation of ethical standards and use of new media [23].

As a starting point for analysis of external factors for changes in U3A is recognized government "Report on Intellectual Capital of Poland" published in 2008. This document draws attention that in terms of intellectual capital, Polish seniors take last place among 16 compared European countries. Mainly due to the low employment rate of people over 50 and their high sense of alienation. Therefore it was recommended: change in state policy for people 50+, create a social pact for their activation and changing attitudes towards the elderly, tailoring education, popularization of age management and pension reform [24]. Since 2009, under the European Commission's Grundtvig program in Poland seniors volunteering and international exchange of U3A good practices are supported. This theme was continued in 2011 on European Year of Volunteering. Appropriate recommendations for seniors on European and national level were created [25,26,27,28].

In 2011-2012, are emerging national senior policy centers. In the March 3, 2011, the Ombudsman called Commission of Experts on Ageing, December 1 started Parliamentary Group on University of the Third Age, while on December 21 Parliamentary Group on Ageing. August 16, 2012, entered into force the Prime Minister directive for creation of Seniority Policy Department in Polish Ministry of Labour and Social Policy. On February 18, 2013 work of the Seniority Policy Council was inaugurated. Not without significance is the fact that in 2013 was started retirement age reform prepared for gradual raising it to 67 years as well as it's equalizing for men and women.

Moreover European Parliament and the Council declared 2012 as the European Year for Active Ageing and Solidarity between Generations. At the same time the Polish official translation of this name did not meet the concept of "active ageing" of society. It relate only to activation of those who are already in old age. In the same year the Senate established a

University of the Third Age year, while Government Population Council convened the Second Demographic Congress which took place throughout the whole year. It also patronage conferences and seminars on the ageing of the population. To the Poland National Action Plan for European Year for Active Ageing and Solidarity between Generations implemented a number of initiatives for support, and from initiation of the U3As [29]. On 19-20 March 2012 in Warsaw U3A National Congress took place. During this event was formulated and adopted appeal aiming to start work on development of mission and strategy common for all U3A.

In early July 2012 Polish Ministry of Labour and Social Policy published the draft of "Government Programme for Senior Citizens Social Activity" for the years 2012-2013 (pol. "Rządowy Program na rzecz Aktywności Osób Starszych na lata 2012-2013"; ASOS), which was already adopted on August 24 [30]. Short time of works on the document, a limited range of consultations and general objectives have met with criticism from experts and non-governmental organizations [31]. However education of older people was the first priority in competitive component of program. Offered support includes such actions like: educational activities, educational programs about ageing, older people and active ageing, preparatory classes for volunteer services, training caregivers, promoting volunteering skills and promote the educational offer in the elderly.

After proceed the first ASOS competition, November 19, 2012, in the Parliament took place conference summarizing activities of U3A year during which was adopted "Pact for Seniors" (pol. "Pakt na rzecz Seniorów") [32]. Document contains a number courses of action for U3A, recommendations for principles and directions of national seniority policy, postulates to central government and recommendations for implementation of pact in cooperation with central and local government. At this point it is sufficient to note that, according to the Pact U3A should:

- (1) Continue the standardization;
- (2) Promote activation of seniors in building civil society and labor market;
- (3) Develop intra- and intergenerational volunteering;
- (4) Develop entrepreneurship and economic activity of elderly according to the concepts of "silver economy" and social economy;
- (5) Promote good practices of local governments, prominent persons, social activists, producers;
- (6) Establish national advisory board for U3A, representing the entire community, creating its policy and strategy, supervising implementation of the pact and animating cooperation with government;
- (7) Promote U3A and their achievements.

In Poland evaluation of European Year for Active Ageing and Solidarity between Generations is noted that challenge for implementation of the Pact is to create a system of its communication, monitoring its implementation as well as take into account of long-term policy assumptions for Polish seniority policy for 2014-2020 period [33]. At the opening of Seniority Policy Council were presented concept of creating a



senior civil parliament that would provide a national representation for social category of older people to the government and will serve as a forum for emerging local and regional Councils of Elders [34]. It is reasonable to undertake a comparative study of this type of parliaments and councils (taking into account also other than U3A seniors organizations) as well as construction their national system.

#### IV. UNIVERSITIES OF THE THIRD AGE - NEW MODELS FEATURES

Approximated factors at the varying degrees will determine the organizational rules changes in U3A. It should be assumed that further differentiation of these centers will occur. Polish nationwide diagnosis carried out in 2012 indicates at least five criteria of U3A ideal types<sup>5</sup>. These are:

- (1) Management (managerial-service; self-governing; self-governing-institutional);
- (2) Academicism (synergistic; programmed; formal facade; ritual);
- (3) Program (academic-scientific; educational-recreational; educational-integration; education-art; socially engaged);
- (4) The area of action(education centers; centers of education and socio-cultural; educational platform for leaders);
- (5) Audience (seniors; open).

Reasonable are additional research on such divisions such as U3A participation in standardization as well as their activity in associations and U3A representation. Diagnosis also points the 11 recommendations and challenges<sup>6</sup>. These are:

- (1) The risk of U3A monopoly in activation and senior education;
- (2) The requirement of evaluation, diagnosis and standardization U3A while benefiting from their diversity;
- (3) Adjustment of U3A offer to the less active seniors - men, people with disabilities and older workers;
- (4) Increasing the participation of students in U3A management;
- (5) The development of additional integration activities in small groups;
- (6) Building and developing partnerships with other institutions;
- (7) Flexibility to adapt the offer to the needs of students;
- (8) Increasing in program offer share of classes to prepare for the activities for the community, taboos (eg late old age, death, loneliness), activities in preparation for the fulfillment of new social roles, supporting entrepreneurship;
- (9) Networking U3A;
- (10) Promoting the involvement of senior outside U3A in such spheres as the family, neighborhood, other organizations;

(11) Advocating the interests of older people at the local level (eg, by running consultations and advice to senior citizens).

M. Formosa, researcher associated with the International Institute on Ageing which constituting UN agency, identifies six solutions for U3A adapt to modern socio-economic conditions [35]. These are:

(1) A transformational rationale. The provision of older adult education should be directed to aid older persons gain power over their lives. Education is to be viewed as a vehicle for retraining or adjusting to technological change, relating to selffulfilment and the reinforcement of a sense of purpose, and above all, a catalyst for individual and social empowerment.

(2) Intergenerational learning. U3A should be able to cater for learners from the whole of the life course, organising educational activities that link third agers with children, teenagers, adults, and even older peers. Elders can mentor individuals from the younger generation, they can also learn from the younger generation. Intergenerational contact is an opportunity for reciprocal learning, improving the everyday memory function of older learners. Interaction helps with dispelling stereotypes that each generation may hold about each other, whilst also encouraging respect for differences.

(3) Fourth age learning. The development and educational needs of frail older people, especially the physically dependent and those living in residential/nursing homes, must be made central to U3A. Encouragement for educators to make use of specialised strategies. Older people, irrespective of their cognitive abilities, should be fully involved in the maintenance of their past skills and interests, and in developing new ones, of their choice. They should be involved in the creation of care packages and support plans.

(4) Geragogy. U3A must rejects traditional models of education. Educators must embrace a liberating practice that helps learners to perceive social, political, and economic contradictions. The first step is to generate a liberating curriculum. This involves the immersion of educators within older people's thematic universe in order to develop "generative themes", which then are codified into other motifs that older learners can identify with. The second step consists of aiding learners to perform a successful decodification of the former. Only so will inherent social, political and economic oppressions become apparent. This can be achieved through the strategies of dialogue and problem-posing.

(5) Social inclusion. U3A must work to counter the psychosocial barriers such as the stereotypical and ageist belief in the adage "I'm too old to learn", and adopt a sensitivity towards the fact that disability may prevent people's adequate mobility or the need to use public transport may limit access. U3A must not contain non user-friendly enrolment procedures (such as high fees, inappropriate venues or unexciting methods of teaching and learning), and communication problems (brochures printed in too small type). It should also use more medieval sense of the term "universitas", that is, referring to a corporation of persons

<sup>5</sup> See [11] pp. 29-32.

<sup>6</sup> See [11] pp. 41-44.

devoted to a particular activity, and does not refer to awarding of degrees, diplomas, or any other kind of certification.

(6) E-learning. U3A must put more effort to embed in their learning strategies the Web 2.0 based on user-friendly applications, interactive tools (blogs, wikis, podcasts, online journals, virtual picture databases). Such tools offer limitless possibilities for an interactive, empowering, and participatory forms of older adult education. Through the utilisation of new technologies U3A may reach new learners interested in lifelong learning who may not be able to be physically present in the classroom at a specific date, and hence, who otherwise might not have been able to participate in educational programmes.

Examples of solutions important for people who do not have access to the U3A or have difficulties in participating in their place of residence, could be systems of U3A Online [36] and vU3A [37] for distance learning and working in groups.

In the context of previously mentioned development directions for U3A is reasonable to support their involvement in building “silver economy” systems. These changes may represent innovations in combining them with the movements of “free culture” and “open education” through the creation and application by these centers such solutions like: free and open source software, open educational resources, media education, content production models, use of social media, project management, social marketing, fundraising, community development, and seniors e-volunteering [38,39]. One example is projects like Timewitnesses and World U3A, which includes the collection of works, seniors memoirs and their participation in the heritage digitization [40].

An important feature of new U3A models should be their networking, inclusion of innovation policies as well as systems of technology transfer and commercialization of knowledge. Then they should not only be seen as continuing education units, but also facilities to create new technologies and businesses, attracting the most active people, building a climate of tolerance for cultural exchange [41]. U3A may participate in research projects for organizations dedicated to seniors, such as business, government, non-governmental organizations and mass media [42]. Examples are provided by creating goods and services in accordance with the gerontechnology paradigm and universal design concepts, where seniors are involved to generate ideas as well as test products and technologies [43]. This activity can be coordinated within the various forums, platforms, networks, associations, virtual organizations, consortia, clusters, conferences and trade fairs, associations and partnerships. Furthermore, U3A can collaborate in building medialabs - interdisciplinary cultural institutions open to the public activity, which would add recipients to the co-management/governance of those institutions, as well as build the links between business, science and social activity while taking into account contemporary Internet culture and mitigating prone to conflicts changes in intergenerational relationships<sup>7</sup>.

## V. BARRIERS TO THE CONSTRUCTION OF NEW U3A MODELS

Phenomenon's which may limit the implementation of these solutions should be noted. K. Komp, gerontologist from the Swedish Umeå University, shows five such barriers. First two relate generally to all social reforms, three more are appropriate for conducting policies for the elderly<sup>8</sup>. These are:

(1) Path dependency - reliance on historically chosen development path; new development decisions are dependent from previous decisions. It implies that established points of view are applied to new situations and new phenomena. In this case: established perceptions of older people are applied to third-agers. They might be perceived as individuals in need of support, even though they are capable of providing support themselves. Path dependency means also that established approaches for dealing with a situation are transferred to new situations. This means that support programs for third-agers are likely to resemble established support programs for fourth-agers.

(2) Fixed rules for redistribution of resources – means that change of policy toward third-agers and U3A need also change of priorities and activities in governmental activities. This implies that resources need to be redistributed to support these new priorities and activities. For example individuals who receive more resources might support redistribution, while those who are provided fewer resources will most likely disagree with the change. Their disagreement may hamper the process of redistribution in two cases: when a critical mass of people is concerned or when strong lobby groups coordinate efforts to support those viewed as being disenfranchised.

(3) Identification of Third-Agers – new models of U3A may increase differentiation between third-agers and fourth-agers. So identifying third-agers among older people is essential for political intervention - it helps governments estimate how urgent such intervention is, it helps in the design of the intervention, and it is necessary when evaluating the effects of the intervention. There are some difficulties in identification of third-agers: (a) older people are usually classified according to their age, not according to their characteristics. The only exception is informal care - caregivers are often classified according to their relationship to the person in need of care; (b) measures of evaluation the impact of population ageing are also usually based on age. For example dependency ratio defines individuals aged 20-64 as “productive”, while everyone above these ages is “unproductive.” This not indicates those who are productive after retirement.

(4) Welfare mix - adopted configuration of used social policy instruments and contribution of different actors for welfare production in a country. It usually considers: state, market, voluntary associations (third sector), and families. U3A are mostly third sector entities. But third-agers contributions to welfare production may also be developed by other actors by paid work, volunteering, and caregiving. Governments should paid attention to welfare mix and

<sup>7</sup> See [19,20].

<sup>8</sup> See [8] pp. 57-62.

promoting U3A activities. Nowadays paid work is at the center of governmental activities and remains the only productive activity supported in this capacity.

(5) Moral economy of ageing - permission to older people rest and lack of involvement as compensation for years of work in the previous stages of life. Social norms and moral assumptions underlying social interaction may be different in each country. In some cases encouraging older people to contribute to the welfare state could be considered excessive and unfair. It could thus lead to protest, opposition, and the loss of votes in subsequent elections. In such situations governments might consider political economy of the Third Age as risky and distance themselves from it.

## VI. CONCLUSIONS

The aim of this study was to present criticism of U3A and their challenges as a centers of animating actions for alleviating the negative impact of population ageing as well as exploring its progress. The article also drew attention to internal and external factors of adaptation their organizational rules as well as searching for new models of U3A. Keep in mind that the implementation of organizational innovations is related with conflicts of interests. Without support of U3A participants new structures of these centers may be constructed at a rate that not match to the process of ageing.

In-depth analysis requires at least four areas. First, more research are justified for comparison models, taking into account differences between social security systems and functioning of economy in which U3A operates. Secondly research on representation of the interests of the elderly models at the national, regional and local are important. The third direction should be research on interorganizational links of U3A with their surroundings and institutions involved in the construction of the "silver economy". The fourth direction is a study on organizational change in the rules of U3A, forms of management, standardization as well as adaptation to new technologies of information and communication.

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